

2003

Maryland Horticulture Industry Economic Profile

Sponsored by:

Maryland Nursery and Landscape Association



Completed by:

USDA – Maryland Agricultural Statistics Service

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ACKNOWLEDGMENTS

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We wish to thank all members of the nursery community who responded to the survey and to express a special note of gratitude to Jim McWilliams, Vanessa Finney, John Peter Thompson, and George Mayo of the Maryland Nursery and Landscape Association for providing guidance throughout this project.

EXECUTIVE SUMMARY

How should an industry measure its economic value? The Maryland Nursery and Landscape Association decided to look to its roots for the answer to this query.

Plants - Plants are the origin and the fuel that propel a vast, dynamic and nearly immeasurable equation of economic stimulation and development throughout the world. In Maryland, plants have helped to grow the areas of outdoor living, environmental development, remediation, habitat, education, entertainment, climate control, filtration, stabilization, and service.

While we can only imagine the total impact plants have on the economy of our state, we can quantify the value of horticulture at its headwaters. In a survey performed by the USDA – Maryland Agricultural Statistics Service and underwritten by the Maryland Nursery and Landscape Association, the following statistical profile offers a basis of understanding and insight for the value of horticulture in Maryland.

Here are a few highlights from the statistical profile:

- **Gross receipts were nearly \$1.04 billion in 2003**
 - Retail sales accounted for 55% (\$564.42 million)
 - Landscape Installation/Maintenance accounted for 23% (\$234.75 million)
 - Wholesale sales accounted for 21% (\$220.12 million)
 - Other categories accounted for 1% (\$15.97 million)
- **Woody plants topped product sales**
 - Woody plants 35% (\$293.14 million)
 - Annuals 26% (\$219.87 million)
 - Herbaceous Perennials 19% (\$158.89 million)
 - Aquatics 8% (\$62.12 Million)
 - Other products 12% (\$97.37 million)
- **Maryland horticulture businesses maintained 16,061 acres in 2003**, including 17.7 million square feet of covered (greenhouse) space and sales and holding areas.
- **Of all plants sold in Maryland 43% are Maryland grown**
- **Over 12,800 people are employed by the industry**
 - **Majority (53%) are employed for over 150 days**
 - **Average labor wage is \$9.08/hr-** (nearly \$4.00/hr above minimum)
- **Factors Limiting Growth**
 - **Human Resources** – continue to be important in limiting growth
 - **Government Regulations** - a perennial factor limiting growth
 - **Weather** - an important factor limiting growth

Please take time to review all of the data included in this publication. The Maryland Nursery and Landscape Association would like to thank the USDA – Maryland Agricultural Statistics Service and their statisticians for their expertise and diligence in preparing this very informative statistical and economic profile.

The conclusions stated in the survey demonstrate a conservative profile of the "Green Industry" in Maryland. Unlicensed plant producers and dealers are not included in the survey. Also, the survey does not include the millions of dollars in economic activity generated by events such as the Mid-Atlantic Nursery Trade Show held in Baltimore each January.

George Mayo, Maryland Nursery and Landscape Association

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Maryland Horticulture – 2003

A Statistical Profile of the Horticulture Industry in Maryland

OBJECTIVE

The 2003 Maryland Horticulture Survey was conducted to measure the scope and impact of Maryland's horticultural industry. The survey quantifies the types of plants grown and sold in Maryland, the sources and destination of plant materials, the number of individuals employed in the industry, the tenure of operation, the value of land and equipment, and horticultural sales. This survey also identifies factors which may be impacting growth of the industry. One final objective was to provide a measure of change with the previous survey conducted in 2000.

SURVEY DESIGN

Survey Sample.¹ All licensed nursery operations in Maryland were included in the 2003 Horticulture Survey, for a total of 1,140 operations. This sample included 20 major chains, representing 383 of the licensed operations. Surveys forms were sent to these 20 major chains and the remaining 757 licensed operations. Unlicensed businesses were not included in the survey.

There was a significant decline in the number of licensed operations between the 2000 survey and the 2003 survey. One of the most noticeable differences was the number of chain stores in the sample compared to the 2000. In 2000, there were 30 major chains with 703 stores; nearly double the number contacted in 2003. This decline can primarily be attributed to some chain stores changing product lines that do not require state licensing. In addition, several operations went out of business or changed their product mix in the three years since we conducted the 2000 survey. The net result of these changes was a decline in the sample of 437 operations.

Any individual or business that grows or sells perennial plant material in Maryland must be licensed by the Maryland Department of Agriculture, Office of Plant Industries and Pest Management. This includes growers of plant materials, landscape contractors, retail sales operations, and plant brokers. No license is required for businesses that grow or import annual plants, interior plants, or tropical plants. This exemption includes cut-flower growers, orchards, flower shops, and turf growers; however, many of these operations chose to be licensed so that they could ship plants out of state.

What is a Horticultural Product? For the purpose of the 2003 Nursery Industry Survey, horticultural production included nursery plant production, brokerage services, landscape design, installation, maintenance, renovation, lawn care, fertilization, mowing, trimming, mulching, erosion control/hydroseeding, plant delivery, plant rentals, watering, irrigation, interior plant operations, tree work, tree moving, tree spraying, IPM, seeding, and sales of Christmas trees, floral greenery, and plugs. In the 2003 survey, planners decided also to include the sale of hardscape products and services related to hardscape installations.

¹ Because of the nature of state licensing, many "Green Industry" producers and businesses are not included in this survey. Therefore, it is understood that the conclusions contained in this document offer an incomplete profile of the entire "Green Industry" in Maryland.

The following items were not considered nursery items in the 2003 survey: gifts, Christmas shop sales, snow removal, lighting, consulting, drainage work, excavation, value added products, and sales of produce, mulch, soil, fertilizer and stone.

Data Collection. The data collection phase was preceded by survey publicity letters sent to all respondents and by advertisements in industry publications. Questionnaires were initially mailed to all potential survey respondents in early 2004 with a “second request” mailing in late spring. Non-respondents were telephoned from the Maryland State Statistical Office; then visited in person, by field enumerators, for the final phase of data collection.

Data Analysis. Data were collected, compiled, analyzed, and summarized by the USDA - Maryland Agricultural Statistics Office. Data were key entered using Key Entry III software and analyzed using Statistical Analysis System (SAS) software. Survey responses were analyzed on a statewide and regional basis.

Estimation for Non-Response. Each sampled operation that did not respond was grouped into one of three categories based on type of operation (grower, landscaper, or retail sales) and into one of five categories based on size of operation (hobby, small, average, large, or colossal). Category designations were provided by nursery inspectors from the Maryland Department of Agriculture (MDA) based on their observations during inspection visits, and general knowledge of state horticulture operations that are licensed.

The assumption was made that responses received from completed questionnaires were representative of the population as a whole and that non-respondents would answer questions in a similar fashion. Therefore, if all or part of a questionnaire was left unanswered, it was assumed it was ‘typical’ of other operations with similar sales and type of business, and data were estimated accordingly.

Special attention was given to large operations. These businesses were estimated individually using data from the 2002 Census of Agriculture, the USDA-NASS database, and the MDA nursery license application. If this information was unavailable, estimates were made by calculating averages from similar operations.

RESPONSE

Response to the 2003 Maryland Horticulture Survey increased from 62 percent in 2000 to 75 percent for 2003. Non-response consisted of those who refused or were businesses that could not be contacted. Of those who responded to the survey, 684 were currently in business, 71 were out of business, and 22 were out of scope for this survey.

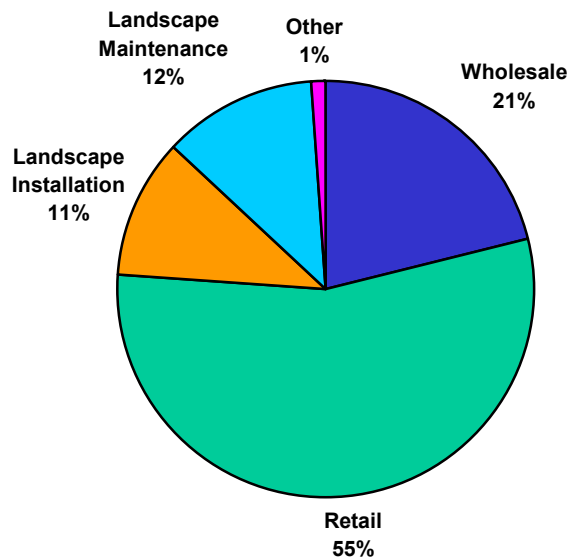
RESULTS AND SUMMARY OF THE SURVEY

Sales of Horticultural Products and Services

Total gross receipts for Maryland licensed horticultural operations were \$1.04 billion in 2003. The retail sales sector accounted for 55% of the total receipts with sales surpassing \$564 million. Although total sales fell short of the \$1.15 billion reported in 2000, comments from survey respondents indicated that extremely wet weather in 2003 contributed to a significant drop in retail sales and landscape installations. In addition, the large decline in the number of retail stores maintaining state licenses most likely contributed to lower sales numbers.

Overall, licensed nursery operations in Maryland reported they expect a 5% increase in total sales in 2004. The two sectors with the largest anticipated increases were wholesale plant sales (12%) followed by landscape installation (9%).

Sales by Business Function



Business Function	2003 Sales		Expected 2004 Sales		Percent Change 2003-2004
	Dollars	Percent	Dollars	Percent	
Wholesale plant sales	\$220,115,858	21%	\$245,705,467	23%	+12%
Retail sales	564,415,632	55%	576,416,645	53%	+2%
Landscape installation	113,235,156	11%	123,319,245	11%	+9%
Landscape maintenance	121,520,386	12%	128,681,274	12%	+6%
Other sales and products ²	15,970,724	1%	15,935,181	1%	NC
Total	\$1,035,257,756	100%	\$1,090,057,812	100%	+5%

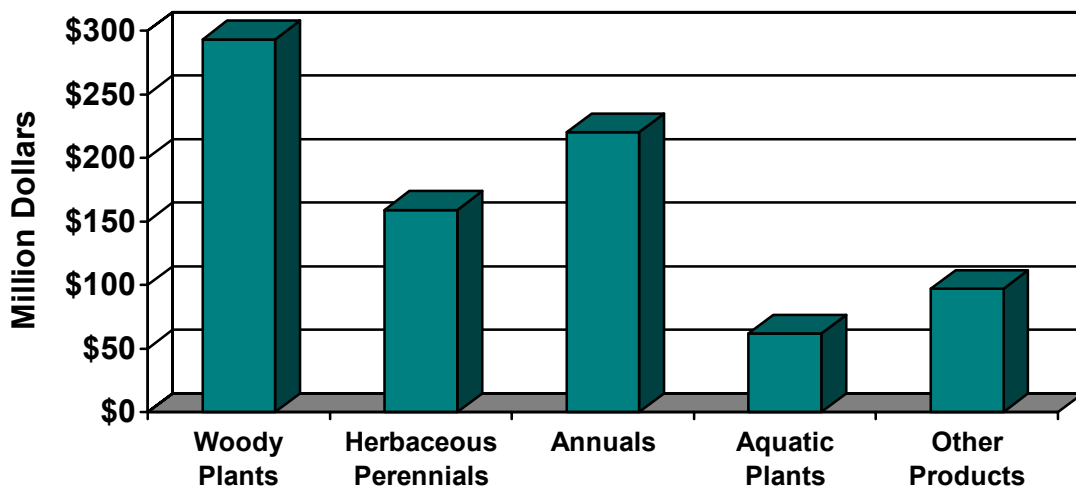
² Includes the sales and installation of hardscape products such as walkways, irrigation systems, decks, etc.

Types of Plants Sold

Revenue related to the sale, installation and maintenance of woody plants totaled \$293 million in 2003. This represented 35% of all plant-related sales and services by licensed horticulture operations. Sales of annual plants were second at \$220 million; 26% of all sales reported. Herbaceous perennial sales at \$159 million were next, followed by aquatic plant sales (\$62 million) and sales of other products and services (\$97 million). Sales related to products and services included specialty greenhouse products (house plants and tropicals), Christmas trees, and bulbs.

Based on survey results, Maryland licensed horticulture operations expected the largest growth in sales for 2004 to be in woody plants. This expected 8% increase far exceeded increases for other product and service categories.

Sales by Plant Type



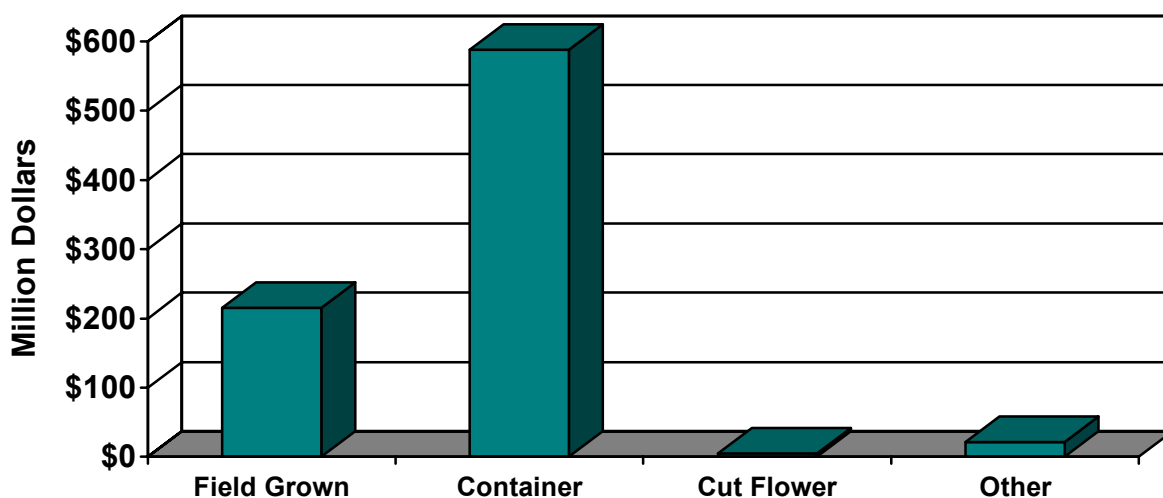
Plant Type	2003 Sales		Expected 2004 Sales		Percent Change 2003-2004
	Dollars	Percent	Dollars	Percent	
Woody Plants	\$293,143,561	35%	\$318,025,832	36%	+8%
Herbaceous Perennials	158,890,150	19%	161,309,483	19%	+2%
Annuals	219,871,870	26%	228,242,559	26%	+4%
Aquatic Plants	62,119,122	8%	63,051,226	7%	+2%
Other Products	97,368,729	12%	101,238,974	12%	+4%
Total	\$831,393,432	100%	\$871,868,074	100%	+5%

Method for Plant Products Sold

Of the total 2003 plant-related sales reported by licensed horticulture operations, 71% or \$588 million were for container-grown products (including all types of greenhouse production). Sales of field-grown products totaled \$215 million or 26% of total sales. The field-grown category included bareroot and balled and burlap products. Cut flower and other products made up a relatively small percentage of the total sales, with 1% and 2%, respectively.

Sales related to field-grown stock were expected to increase 10% in 2004 while container-grown stock sales were expected to increase nearly 4%. Increases in sales were also expected for cut flowers and other products, with projected increases of 3% and 2%, respectively.

Sales by Method of Preparation

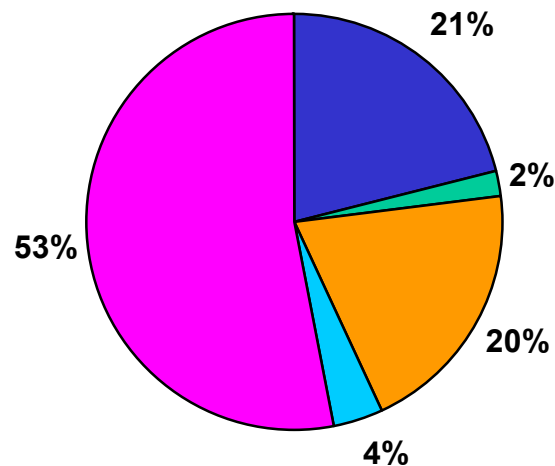


Method of Preparation	2003 Sales		Expected 2004 Sales		Percent Change 2003-2004
	Dollars	Percent	Dollars	Percent	
Field Grown	\$215,479,675	26%	\$236,198,488	27%	+10%
Container	588,175,682	71%	608,706,886	70%	+4%
Cut flower	5,413,383	1%	5,583,680	1%	+3%
Other	22,277,924	2%	22,614,767	2%	+2%
Total	\$831,346,664	100%	\$873,103,821	100%	+5%

Source of Plant Material Sold

The 2003 survey identified significant changes in the sources of plant material sold. Survey results indicated a shift away from the importation of plant material from other states towards the purchase of plants from Maryland nurseries or growing plant materials on their own operations. Sales of Maryland grown materials totaled \$355.5 million, or about 43% of the total plant material sold. Plant material purchased out of state totaled \$472.7 million, or about 57% of the plant material sold. A very small amount (<1%) was imported from outside the United States.

Source of Plants Sold in Maryland



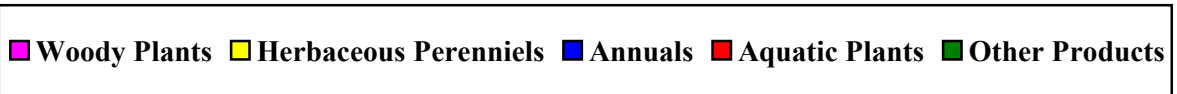
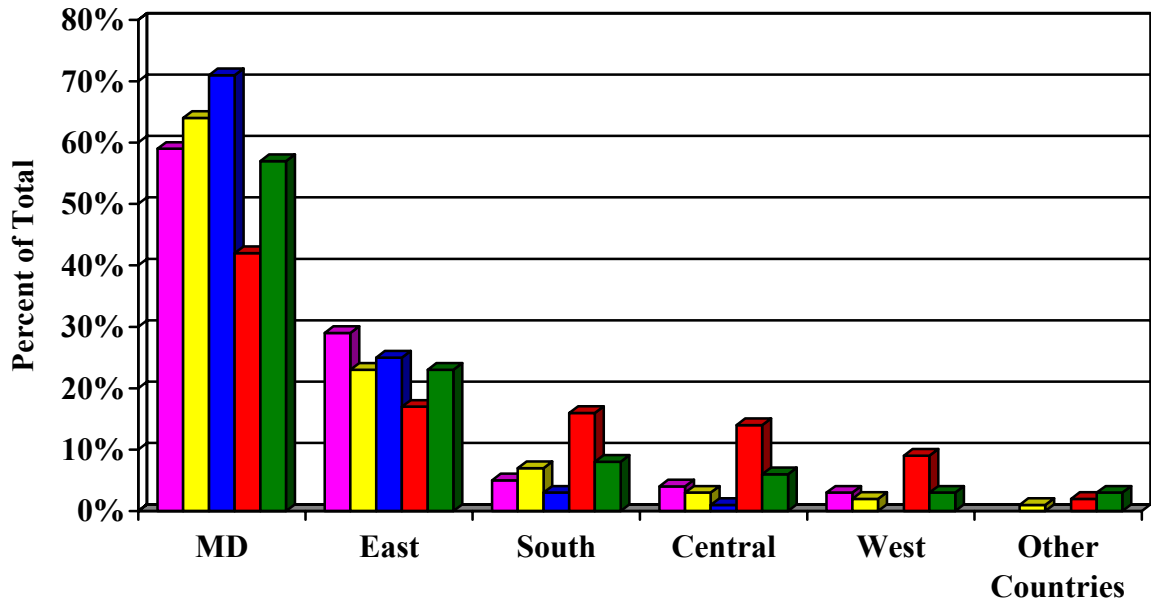
	Source of Plants Sold	2003 Sales	
		Dollars	Percent
1	Grown entirely on the farm where produced	\$175,677,312	21%
2	Purchased from another Maryland nursery unfinished	12,785,681	2%
3	Purchased from another Maryland nursery finished	167,032,385	20%
4	Imported from another state unfinished	33,134,802	4%
5	Imported from another state finished	439,530,193	53%
6	Imported from outside the U.S.	3,294,595	>1%

Destination of Plants Shipped

A total of 282 licensed Maryland nurseries reported shipping plant material. Woody plants were shipped by 32% of respondents (89 producers). Herbaceous perennials were shipped by 76 producers; annuals were shipped by 64 producers; aquatic plants were shipped by 13 producers; and 36 producers shipped other goods such as seed, tropical plants, and bulbs.

Most of the plant material was shipped within the state. The remaining material was shipped primarily to the Eastern or Southern United States. A small amount of plant material was shipped to Canada and Other countries.

Destination of Plants Shipped



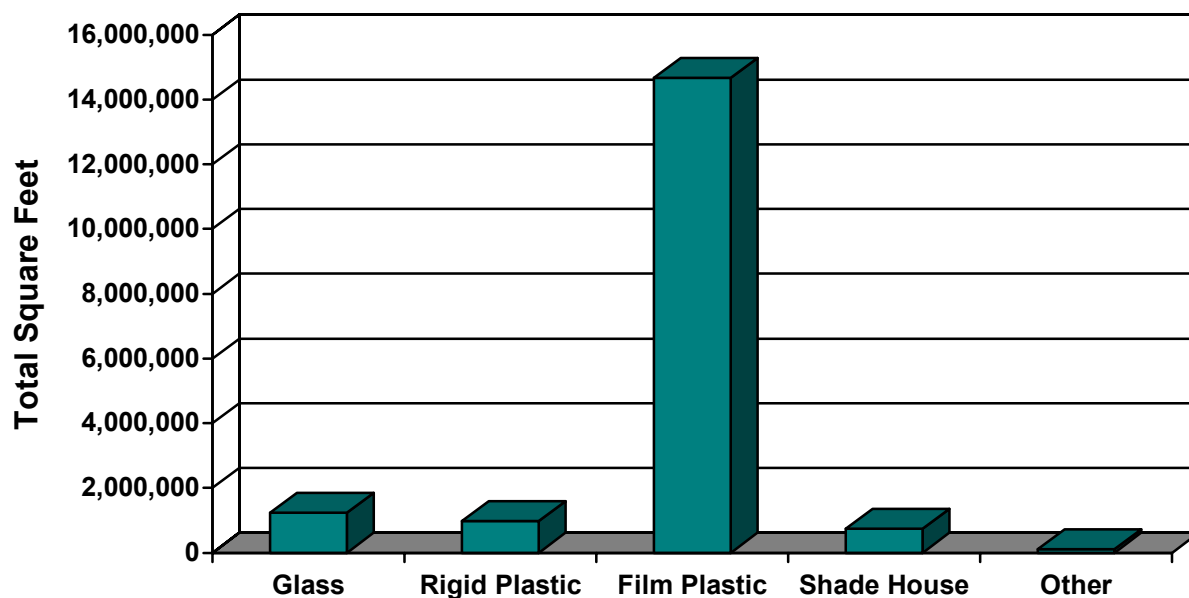
	Percent of plants (by type) shipped to each destination						
	MD	Eastern U.S.	Southern U.S.	Central States	Western States	Canada	Other countries
Woody plants	59%	29%	5%	4%	3%		
Herbaceous perennials	64%	23%	7%	3%	2%	1%	
Annuals	71%	25%	3%	1%			
Aquatic plants	42%	17%	16%	14%	9%	2%	
Other products	57%	23%	8%	6%	3%	1%	2%

Eastern States include ME, VT, NH, MA, CT, RI, NY, PA, DE, NJ, VA, WV
 Southern States include SC, GA, AL, FL, AR, LA, MS, NC, TN, TX, OK, PR
 Central States include OH, MI, WI, IN, IL, IA, NE, KS, MO, ND, SD, MN, KY
 Western states include AK, WA, OR, ID, MT, WY, NV, UT, CO, NM, CA, AZ, HI

Total Acreage and Covered Growing Space

Licensed horticultural operations reported 16,061 acres used for nursery production and sales in 2003. This included 15,654 acres in open land and 17.7 million square feet of covered space. Acreage includes all production, sales, and holding areas.³ Of the total covered space, 83% of the area was in film plastic greenhouses, hoop houses, or over-winter poly houses. Glass greenhouses and rigid plastic greenhouses accounted for 12% of the total covered area. The value of the total acreage reported by licensed horticulture operations (including their structures and equipment) totaled close to \$812 million.

Covered Growing Space by Type

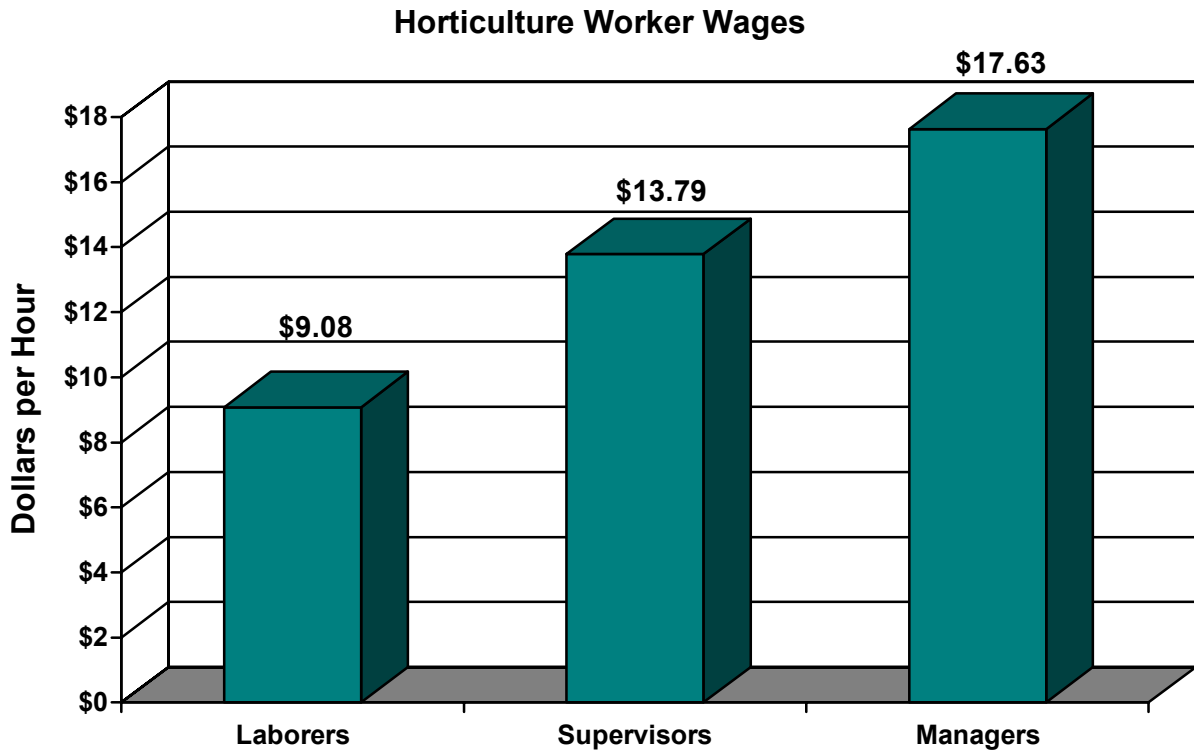


Covered Growing Space	Total Space (ft ²)	Percent of Total
Glass greenhouses	1,231,289	7%
Rigid plastic greenhouses	969,406	5%
Film plastic greenhouses, hoop houses, over-winter poly houses	14,666,043	83%
Shade houses	732,615	4%
Other covered space	116,138	1%

³ The estimate for total acreage is not comparable to estimates from the 2000 survey. In 2000, total acreage did not include sales or holding areas.

Number of Horticulture Workers and Wages

In 2003, there were 12,873 workers employed by Maryland's state-licensed nursery and landscape businesses. Over half (53%) of the industry employees were employed for at least 150 days and the remainder were seasonal workers. Total wages paid by the sampled population in 2003 were \$203.2 million. On average, laborers were paid \$9.08 per hour, supervisors were paid \$13.79 per hour, and managers were paid \$17.63 per hour.⁴



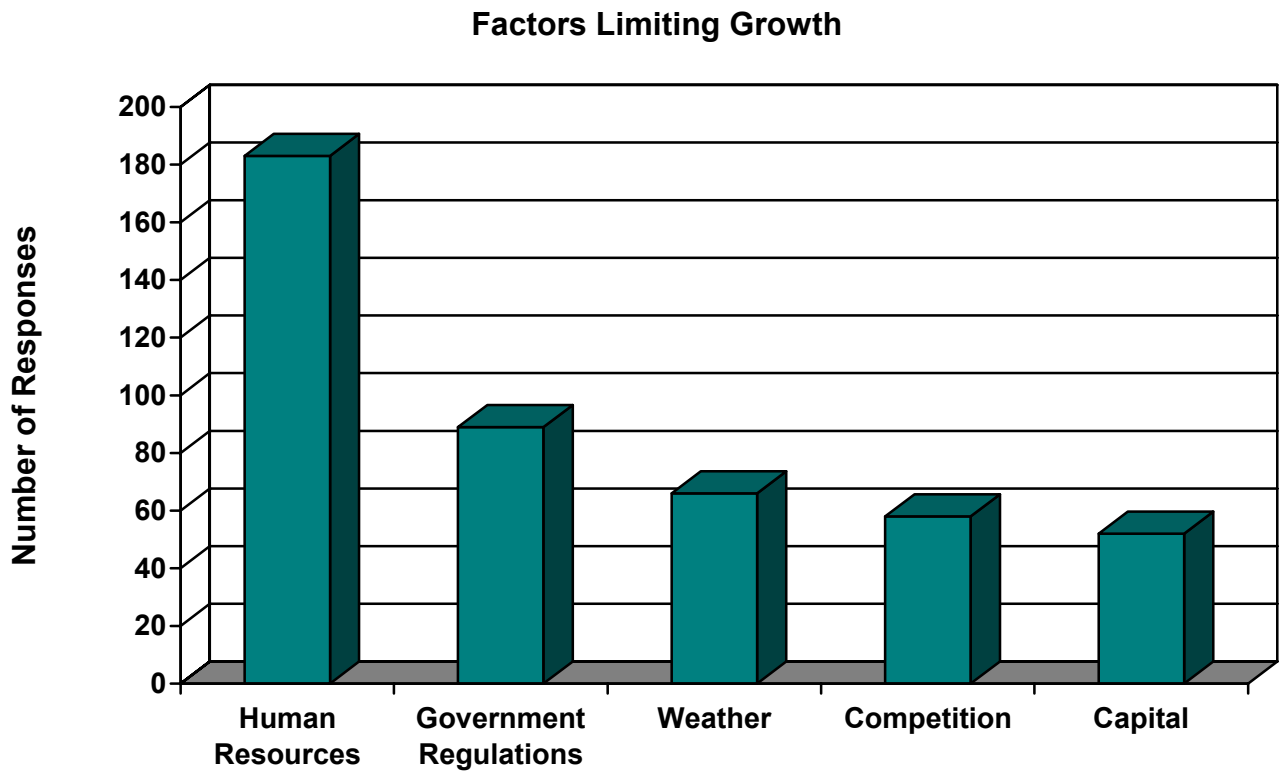
Tenure

Nursery and landscape businesses have a long history in Maryland. The longest running nursery operation opened in 1844 and 38 nurseries have been in business for 50 years or more. The average Maryland nursery has been in business for 23.1 years. One-hundred and fifty-five businesses have opened in the last ten years; 39 have opened in the last three years. Close to 80% of the nursery operations are family owned and operated.

⁴ The estimates for average wages are simply averages for all licensed operations that reported a wage rate with no consideration for the number of workers employed.

Industry Concerns

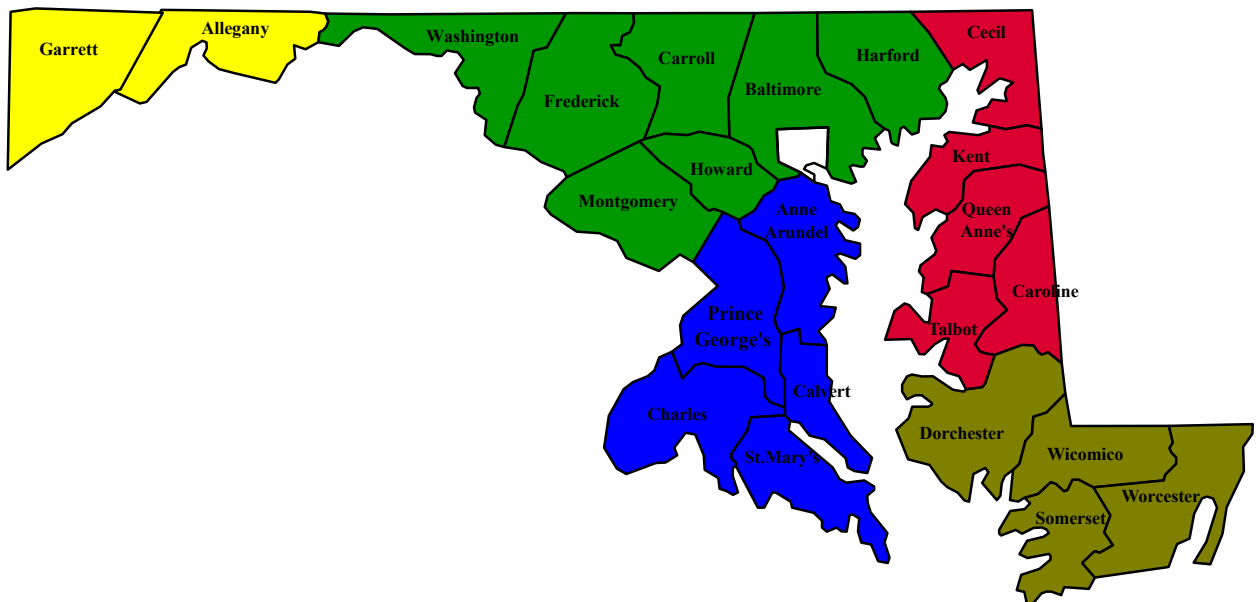
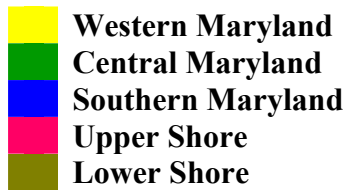
The 2003 Horticulture Industry Survey asked respondents to list the most important factors that limit growth or were problematic to their business. The results from the 2003 survey indicated that five factors affected their growth or were potential obstacles. These factors were human resources, government regulation, weather, competition, and capital. The two most often cited were human resources and government regulation while weather was the third most common response.



Factors Limiting Growth	Number Responding	Percent of Respondents
Human resources	183	51%
Government regulations	89	25%
Weather	66	18%
Competition	58	16%
Capital	52	14%

REGIONAL PROFILES OF HORTICULTURE IN MARYLAND

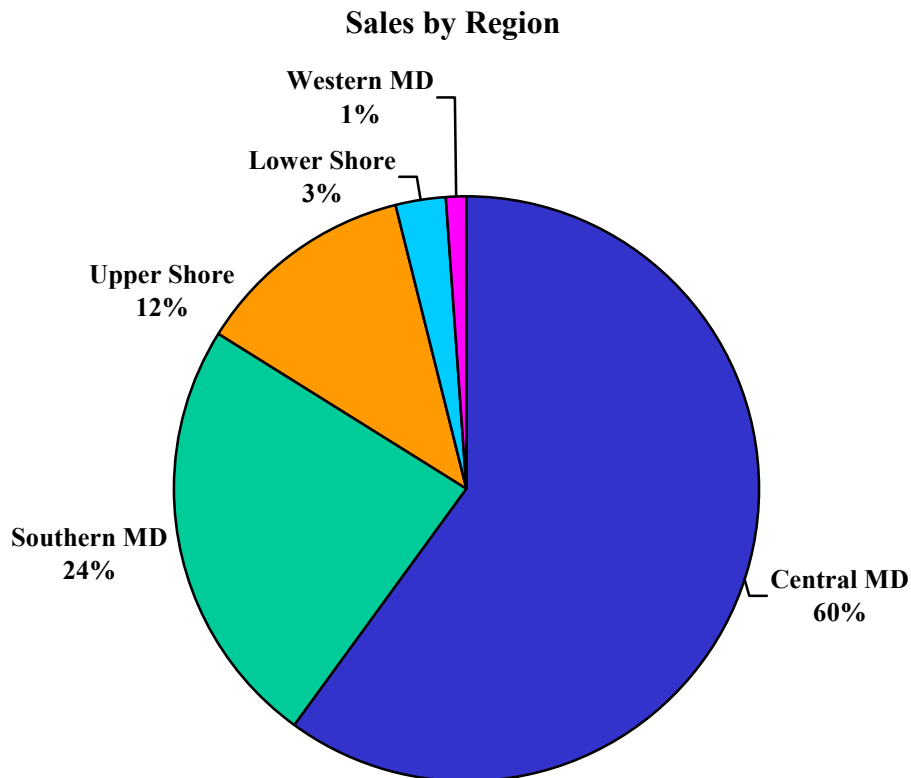
Maryland was divided geographically into five regions – the mountainous Western region, a Central urban core, Southern Maryland and rural counties on the Eastern Shore. Regions defined for the 2003 Horticulture Survey correspond to Maryland Crop Reporting Districts (as defined by USDA-Maryland Agricultural Statistics Service). The Western region includes Allegany and Garrett counties; the Central region includes Baltimore, Carroll, Frederick, Harford, Howard, Montgomery, and Washington counties; the Southern region includes Anne Arundel, Calvert, Charles, Prince George's and St. Mary's counties; the Upper Shore region includes Caroline, Cecil, Kent, Queen Anne's, and Talbot counties; and the Lower Shore region includes Dorchester, Somerset, Wicomico, and Worcester counties.



Sales by Region

The Central region, which includes the areas around the cities of Baltimore and Washington, D.C., leads the state in the value of horticulture sales and services. In 2003, state-licensed companies in this region had nearly \$148 million in landscape sales, compared to \$83 million in landscape sales throughout the rest of the state. Central Maryland represented a large portion of wholesale plant sales (\$124 million) as well. Southern Maryland ranked second in terms of total sales of plants and products and services.

Nearly \$445 million⁵ in total sales of horticultural plants, products, and services could not be classified by region because either they were reported by large chain stores with multiple locations statewide or by large companies unable to provide a regional breakout of sales.

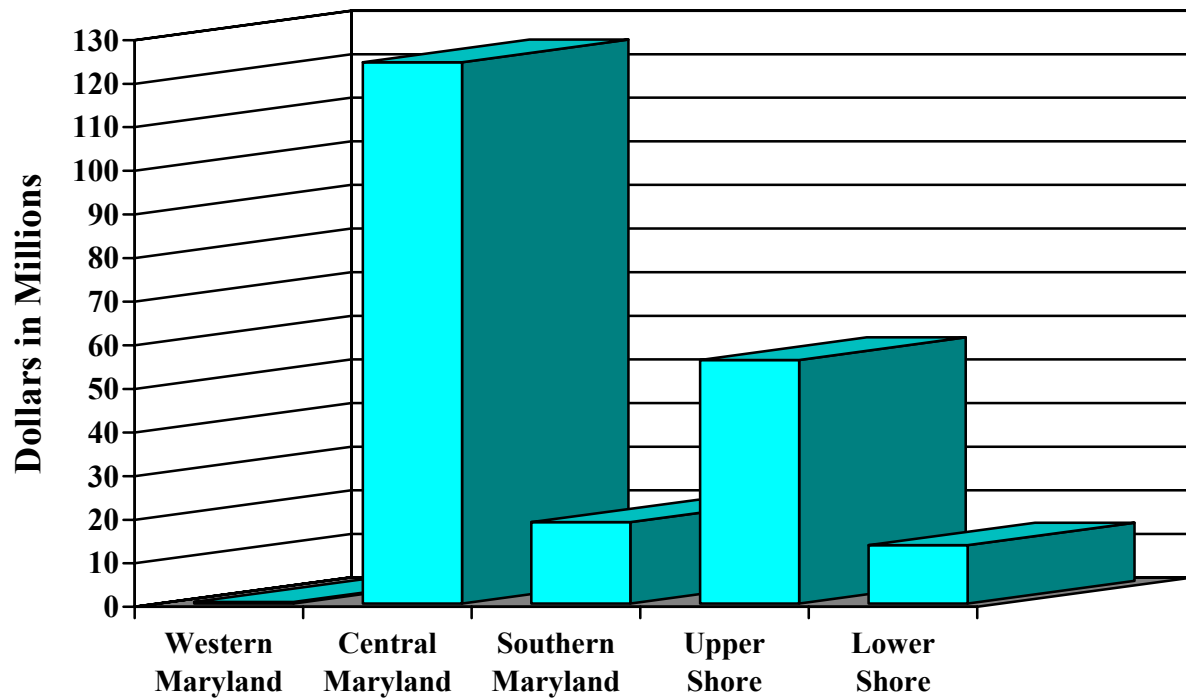


⁵ \$445 million is not included in regional distribution pie chart.

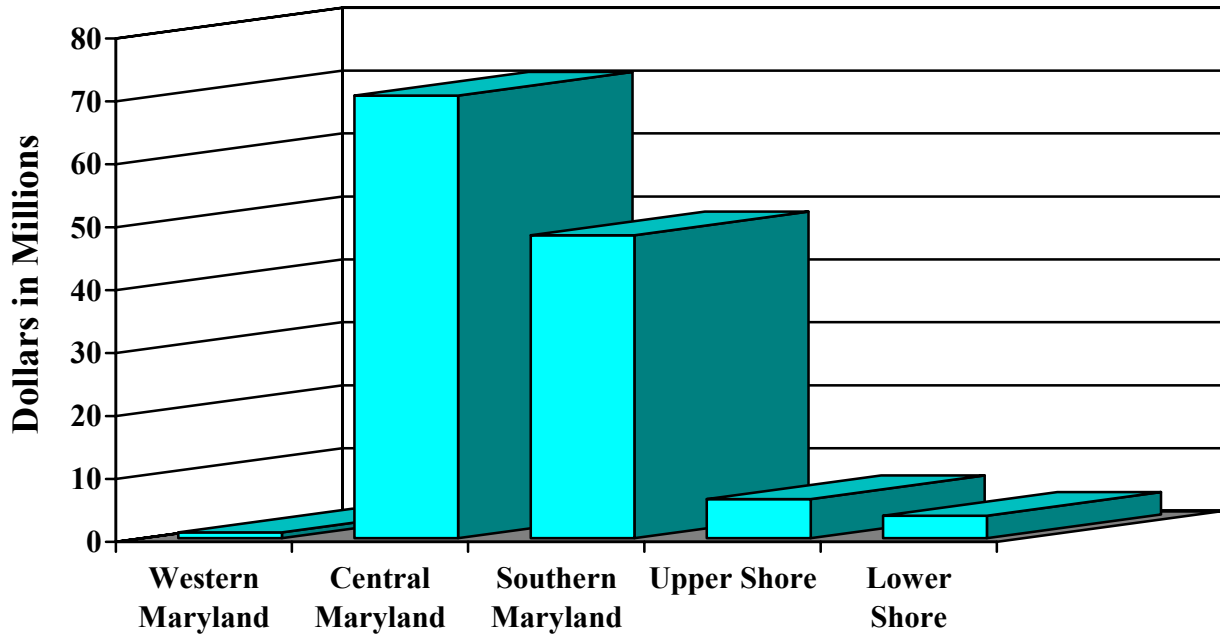
Sales of Horticulture Products by Business Function by Region

	Western Maryland	Central Maryland	Southern Maryland	Upper Eastern Shore	Lower Eastern Shore	Businesses operating statewide
Wholesale plant sales	\$327,260	\$124,124,966	\$18,647,137	\$55,822,774	\$13,351,456	\$8,051,952
Retail sales	\$916,489	\$70,380,215	\$48,140,145	\$6,199,047	\$3,562,227	\$434,389,806
Landscape installation	\$379,450	\$70,276,837	\$31,308,142	\$5,142,034	\$2,718,292	\$1,645,958
Landscape maintenance	\$60,000	\$77,464,413	\$39,262,891	\$1,769,028	\$570,015	\$664,788
Other sales and products	\$980,000	\$7,904,688	\$5,253,160	\$1,487,815	\$8,075	\$282,017

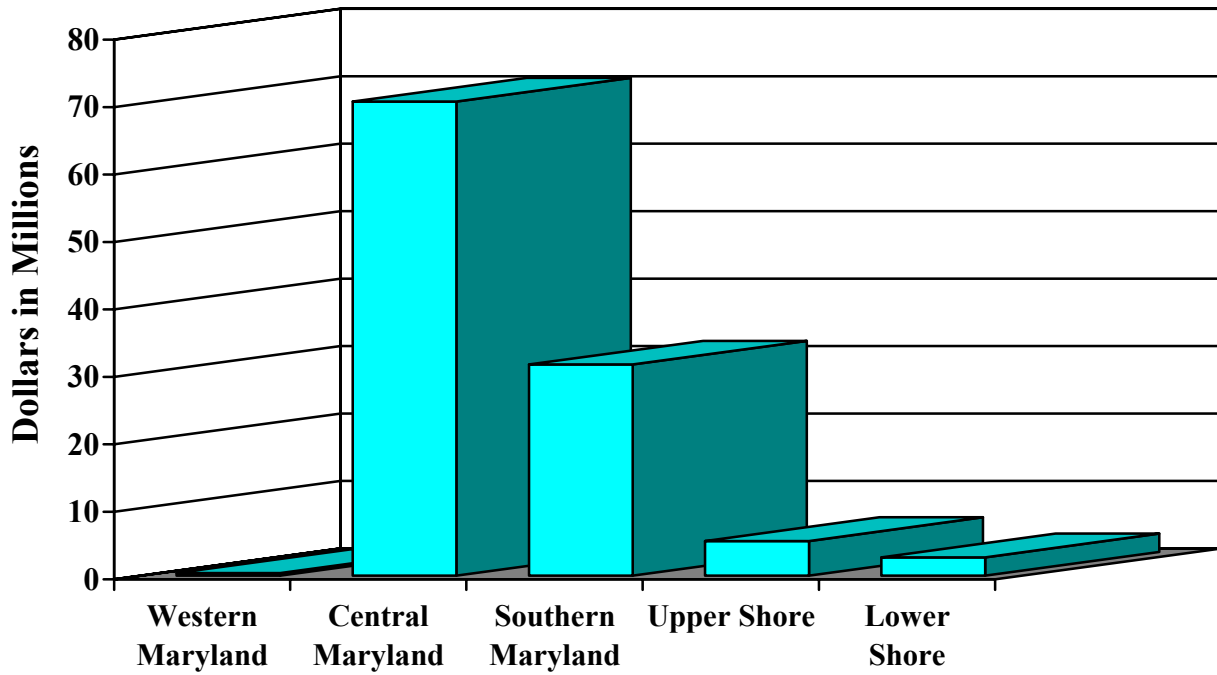
Regional Wholesale Horticulture Sales



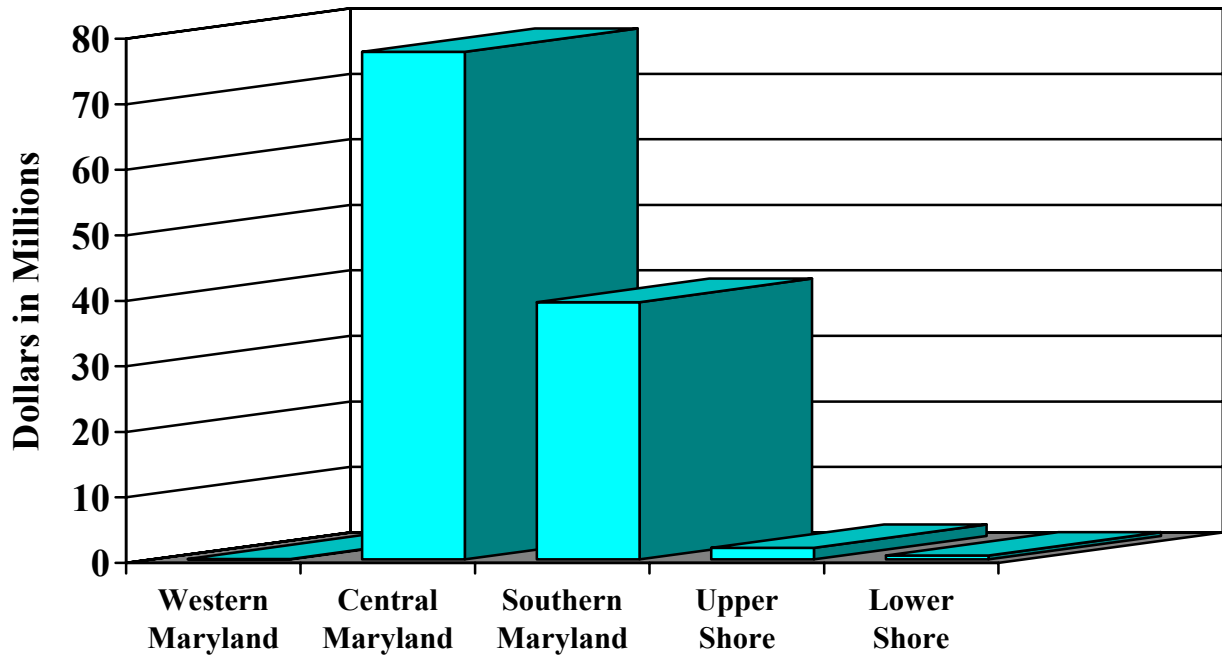
Regional Retail Horticulture Sales



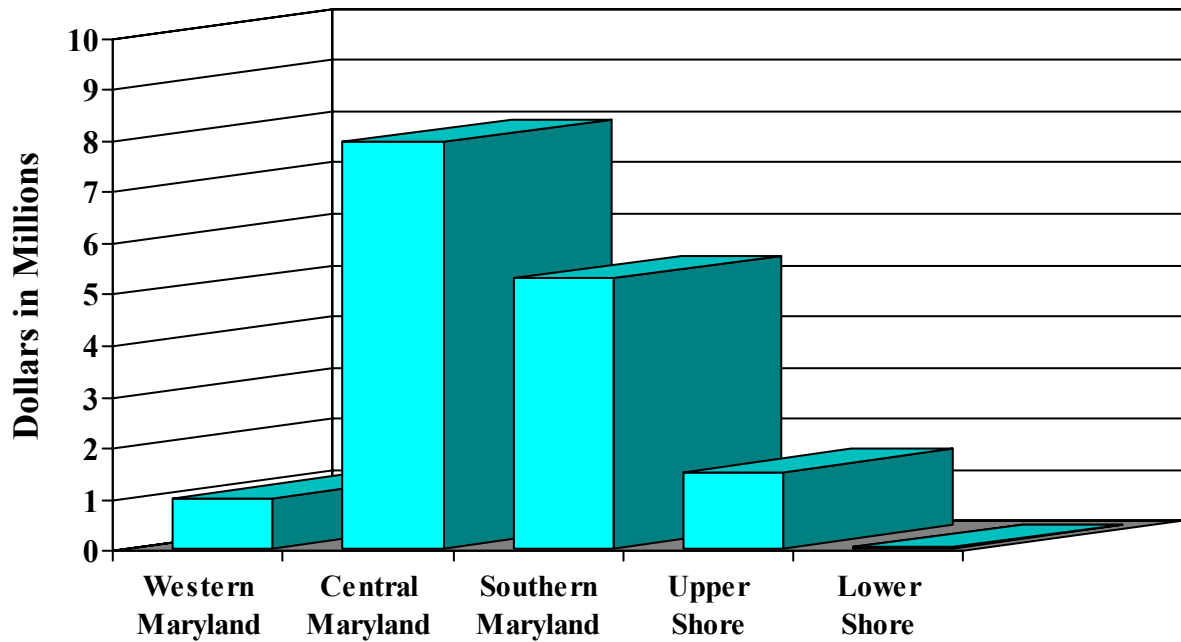
Regional Landscape Installation Sales



Regional Landscape Maintenance Sales



Sales of Miscellaneous Horticulture Products

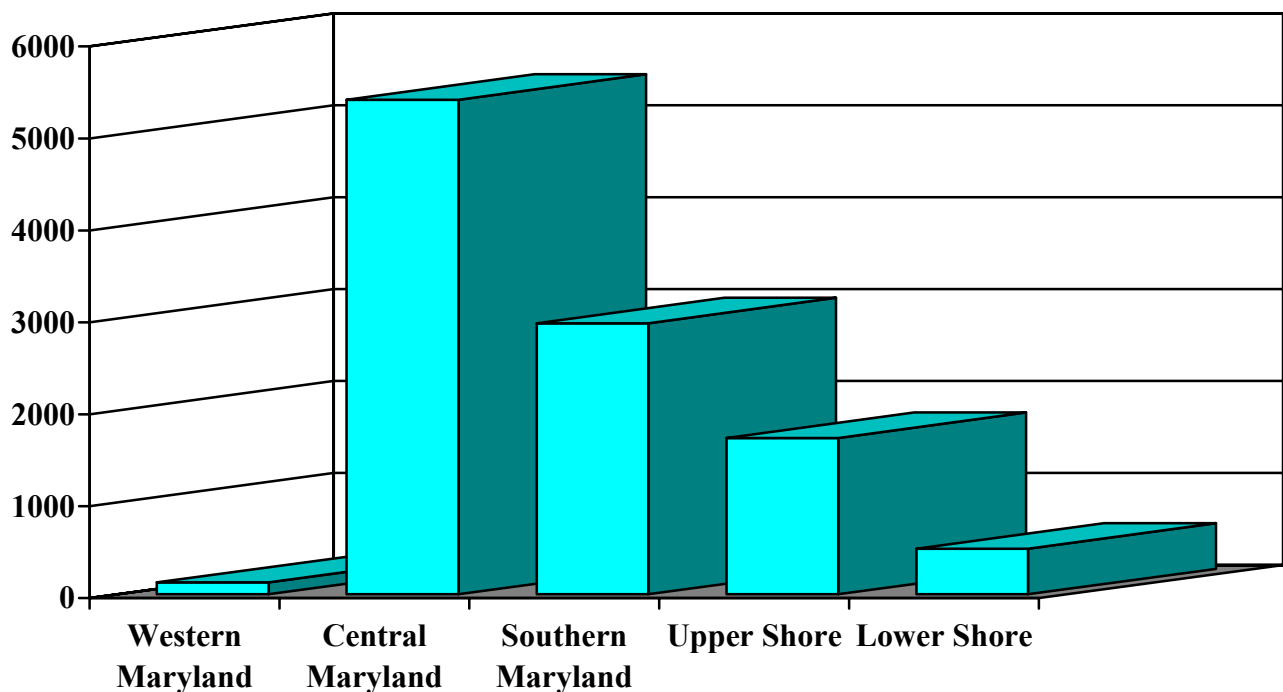


Labor and Wages by Region

In 2003, 12,873 workers were employed in Maryland's nursery and landscape industries. The Central region led the State with 42% of the horticultural workers employed by state licensed operations. Chain stores and nurseries located in multiple regions employed 2, 219 workers while 2,948 workers were employed in the Southern region. The remaining 2,326 workers were employed in the Western, Upper Eastern Shore and Lower Eastern Shore regions. Nearly half of all workers employed by the industry worked on a part-time basis (less than 150 days) in 2003.

Regions	Number of Workers Employed Less than 150 Days	Number of Workers Employed 150 Days or More	Total Number of Workers Employed in 2003
Western Maryland	82	47	129
Central Maryland	2,180	3,200	5,380
Southern Maryland	1,619	1,329	2,948
Upper Eastern Shore	974	727	1,701
Lower Eastern Shore	152	344	496
Statewide Businesses	1,043	1,176	2,219
Total	6,050	6,823	12,873

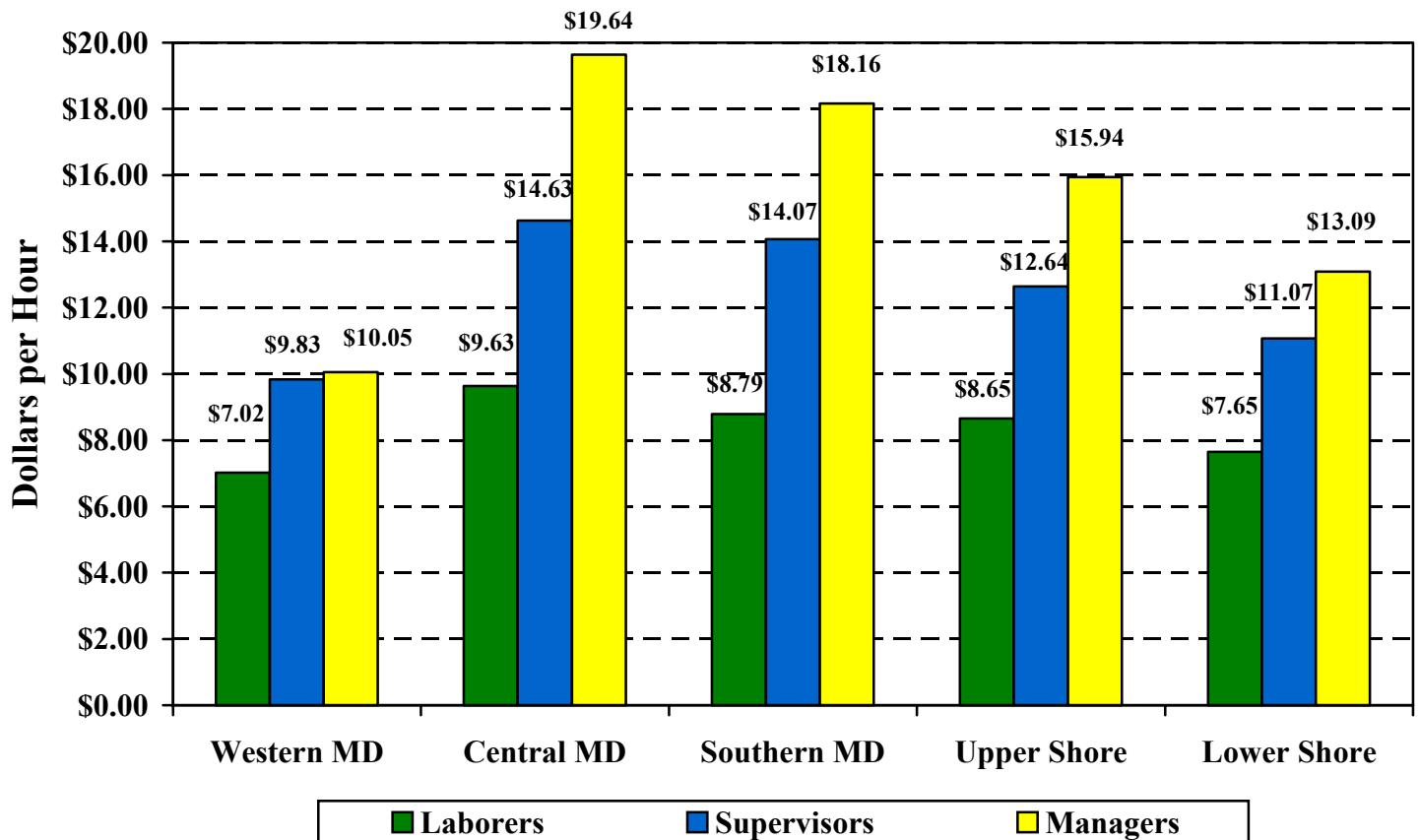
**Number of Horticulture Workers
by Region**



Total wages paid by the horticultural industry in 2003 were \$203.2 million. The majority of the wages paid were in Maryland's Central region accounting for \$98 million of all wages paid by State licensed businesses. In Southern Maryland, wages totaled just over \$52 million. Statewide, chain stores and operations located in multiple regions paid horticultural workers an estimated \$20.5 million.

Regions	Total Wages
Western Maryland	\$1,018,534
Central Maryland	\$98,039,720
Southern Maryland	\$52,061,023
Upper Eastern Shore	\$24,035,113
Lower Eastern Shore	\$7,549,969
Statewide Businesses	\$20,460,599
Total	\$203,164,958

Horticulture Workers Average Salaries

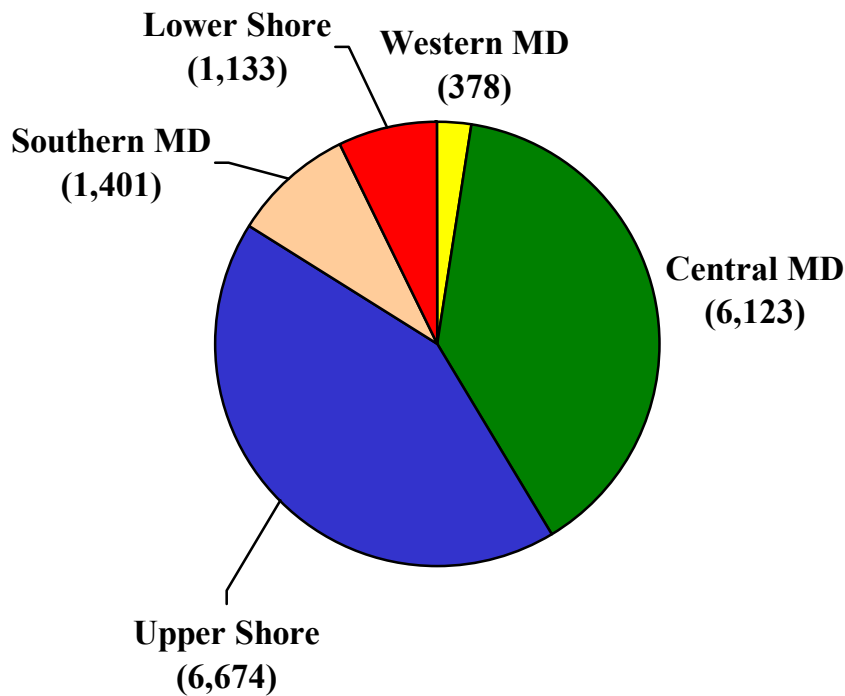


Acreage in Horticultural Crops

Total nursery production and sales area in 2003 totaled 16,061 acres, including 15,654 acres in open ground and 17.7 million square feet (407 acres) in covered space. Nearly 80% of the production, sales, and holding areas were in the Central region and Upper Eastern Shore. Central region businesses reported 6,031 acres of open ground and 4 million square feet of covered space. The Upper Eastern Shore had 6,506 acres of open ground and over 7 million square feet of covered space.

Region	Open Land (acres)	Covered Space (ft ²)
Western Maryland	377	31,512
Central Maryland	6,031	4,004,339
Southern Maryland	1,368	1,458,372
Upper Eastern Shore	6,506	7,310,589
Lower Eastern Shore	1,033	4,347,088
Statewide operations	339	563,531

Acreage in Horticulture Crops by Region



Western Maryland
 Allegany, Garrett Counties

Sales

All Sales of horticulture products and services - 2003		\$2,663,199
Wholesale plant sales	12%	\$327,260
Retail plant sales	34%	\$916,489
Landscape installation	14%	\$379,450
Landscape maintenance	3%	\$60,000
Other sales and products	37%	\$980,000

Land

Area in production (production, sales, and holding areas)	378 acres
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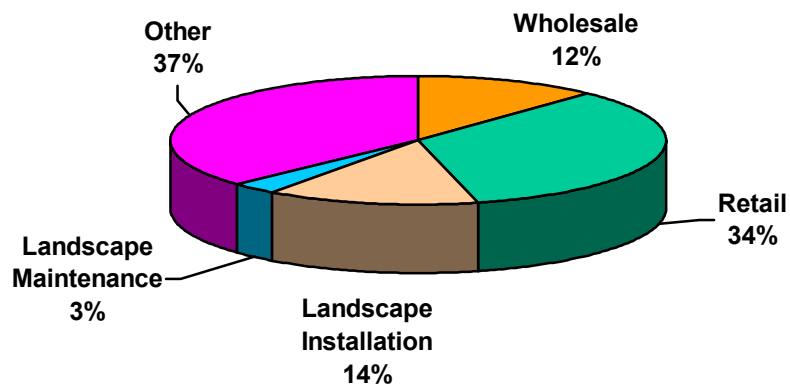
Wages

Total Wages paid to horticulture workers - 2003	\$1,018,534
Average wage rate:	
Laborers	\$7.02
Supervisors	\$9.83
Managers	\$10.05

Labor

Number of horticulture workers:		
Full-time	47	
Seasonal	82	

Horticulture Sales by Type
Western Maryland



Central Maryland

Baltimore, Frederick, Carroll, Harford, Howard, Montgomery, Washington Counties

Sales

All Sales of horticulture products and services - 2003		\$350,151,119
Wholesale plant sales	35%	\$124,124,966
Retail plant sales	20%	\$70,380,215
Landscape installation	20%	\$70,276,837
Landscape maintenance	23%	\$77,464,413
Other sales and products	2%	\$7,904,688

Land

Area in production (production, sales, and holding areas)	6,123 acres
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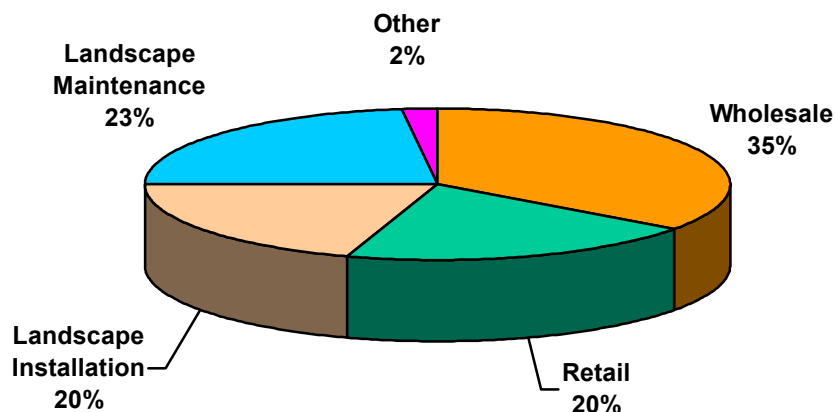
Wages

Total Wages paid to horticulture workers - 2003		\$98,039,720
Average wage rate:	Laborers	\$9.63
	Supervisors	\$14.63
	Managers	\$19.64

Labor

Number of horticulture workers:	Full-time	3,200
	Seasonal	2,180

Horticulture Sales by Type Central Maryland



Southern Maryland

Anne Arundel, Calvert, Charles, Prince George's, St. Mary's Counties

Sales

All Sales of horticulture products and services - 2003		\$142,611,475
Wholesale plant sales	13%	\$18,647,137
Retail plant sales	34%	\$48,140,145
Landscape installation	22%	\$31,308,142
Landscape maintenance	28%	\$39,262,891
Other sales and products	3%	\$5,253,160

Land

Area in production (production, sales, and holding areas)	1,401 acres
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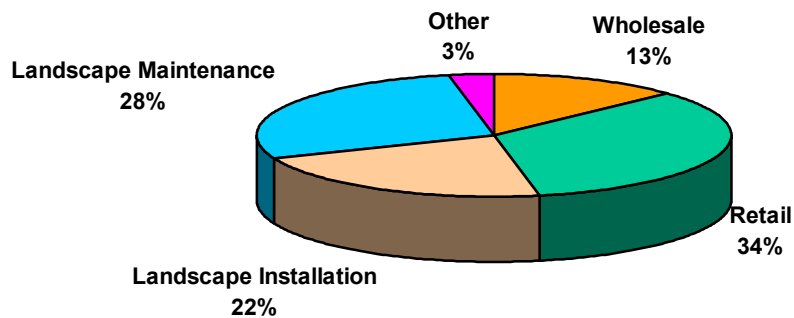
Wages

Total Wages paid to horticulture workers - 2003		\$52,061,023
Average wage rate:	Laborers	\$8.79
	Supervisors	\$14.07
	Managers	\$18.16

Labor

Number of horticulture workers:	Full-time	1,329
	Seasonal	1,619

Horticulture Sales by Type Southern Maryland



Upper Eastern Shore

Caroline, Cecil, Kent, Queen Anne's, Talbot Counties

Sales

All Sales of horticulture products and services - 2003		\$70,420,698
Wholesale plant sales	79%	\$55,822,774
Retail plant sales	9%	\$6,199,047
Landscape installation	7%	\$5,142,034
Landscape maintenance	3%	\$1,769,028
Other sales and products	2%	\$1,487,815

Land

Area in production (production, sales, and holding areas)	6,674 acres
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Wages

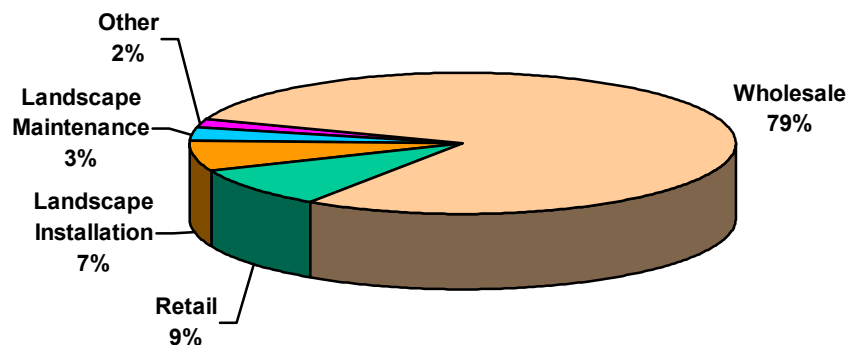
Total Wages paid to horticulture workers - 2003	\$24,035,113
Average wage rate:	
Laborers	\$8.65
Supervisors	\$12.64
Managers	\$15.94

Labor

Number of horticulture workers:		
Full-time	727	
Seasonal	974	

Horticulture Sales by Type

Upper Eastern Shore



Lower Eastern Shore

Dorchester, Somerset, Worcester, Wicomico Counties

Sales

All Sales of horticulture products and services - 2003		\$20,210,065
Wholesale plant sales	66%	\$13,351,456
Retail plant sales	18%	\$3,562,227
Landscape installation	13%	\$2,718,292
Landscape maintenance	3%	\$570,015
Other sales and products	<1%	\$8,075

Land

Area in production (production, sales, and holding areas)	1,133 acres
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Wages

Total Wages paid to horticulture workers - 2003		\$7,549,969
Average wage rate:	Laborers	\$7.65
	Supervisors	\$11.07
	Managers	\$13.09

Labor

Number of horticulture workers:	Full-time	344
	Seasonal	152

**Horticulture Sales by Type
Lower Eastern Shore**

